



Retirement Toolbox

Tax Exempt and Government Entities
Employee Plans
2005 IRS Nationwide Tax Forums

June 28, 2005



Retirement Plan Check-up Toolbox

- What is a Check-up?
- Why do I need to do a Check-up?

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What is included in the Toolbox to conduct a Check-up?

- Checklists
- Tips, Publications and Forms
- Help through IRS Programs

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Checklists

- Provide a quick review
- A one-page list of yes/no questions
- Not a complete plan review

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Tips

- Watch for law changes
- Perform periodic reviews
- Have independent reviewer check plan
- Subscribe to the *Retirement News for Employers* newsletter

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Publications and Forms

- **Publication 4334** - *SIMPLE IRA Plans for Small Businesses*
- **Publication 4336** - *SARSEP for Small Businesses*
- **Publication 4407** - *SARSEP - Key Issues and Assistance*
- **Publication 4224** - *Retirement Plan Correction Programs*

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Need to make a Correction?

IRS Correction Programs:

- Self-Correction Program
- Voluntary Correction Program
- Audit Closing Agreement Program

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Further Assistance Available - Newsletters

- *Employee Plans News*
 - Geared toward practitioner community
- *Retirement News for Employers*
 - Geared toward the plan sponsor

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Further Assistance Available – Web site

Retirement Plans Community

- Benefits Practitioner
- Plan Participant/Employee
- Plan Sponsor/Employer

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Newest Product in the Toolbox

IRA-Resource Guide

- CD-ROM
- On-line Version

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Retirement Plan Assistance

- TE/GE Customer Account Services
 - (877) 829-5500
- RetirementPlanQuestions@irs.gov

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Get your Toolbox

- Visit EP Booth
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 - (800) TAX – FORM
 - Online at www.irs.gov/ep

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